



LEA AND SCHOOL ADMINISTRATOR GUIDE FOR PLANS

WestEd Tracker version 3.0

September 2012

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Introduction

Putting Your Plan into Tracker

Your Plan Leadership Team will likely write your plan offline initially. For entering Plan information into Tracker, it is recommended that you have an electronic copy of your Plan (such as a Word document) rather than a paper version. This will make it easier for you to copy and paste detailed information from your Plan into Tracker.

Note: LEA and school plans in Tracker are nearly identical in their functionality and management and are described here generically as "plans." Certain features, such as plan tags and funding sources are inherited by school plans from the LEA plan. These functions are described below.

Plan Organization

Tracker uses a tiered structure for plans: goals, strategies, action steps, and tasks. You may also create a budget for your plan, and track expenses as you implement the action steps

Goal	<p>A specific, measurable target for students to achieve. States <u>Who</u> will do <u>What</u> by <u>When</u> and <u>How</u> you will know it. (You may write them in SMART format: Specific and Strategic, Measurable, Achievable/Attainable, Results-oriented, and Time-bound.) LEAs may have some goals pre-assigned by the State, and may also add their own, local goals. Schools may select goals from the LEA plan, and re-write them to reflect the school's achievement target, and create their own goals.</p> <p>Title: Maximum 50 Characters Description: Maximum 1000 Characters</p>
Strategy	<p>A general description of a process an LEA or school will take to reach the student achievement goal. Each goal may have several strategies. What will the district/school do to ensure that the goal is reached?</p> <p>Title: Maximum 50 Characters Description: Maximum 500 Characters</p>
Action Step	<p>A specific action or activity that will lead to the implementation of the strategy and achievement of the goal. The action step includes a Title, Description, Begin and End Dates plus comments on timelines, persons responsible, costs and budget sources, and an indication if the step is related to professional development (PD). Progress is tracked by updating status, attaching evidence, and adding comments as the step is implemented. Action steps may also be "tagged" for filtered views of the plan, e.g. all steps affecting Special Education students. Each strategy may have several action steps.</p> <p>Title: Maximum 50 Characters Description: Maximum 1000 Characters</p>

Task	<p>A specific action/activity that leads to the completion of an action step. Tasks have specific due dates, persons responsible and current status. Each action step may have multiple tasks.</p> <p>Title: Maximum 50 Characters Description: Maximum 255 Characters</p>
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Preparing for Plan Entry

Plan Administrators must set up certain functional areas in preparation for plan use. This setup should be done before your team starts entering or significantly modifying the plan, so that all features are available.

Users

LEA and school users who are associated with your LEA have access to your LEA and school plans. Users assigned to the LEA or school may update most areas of the plan:

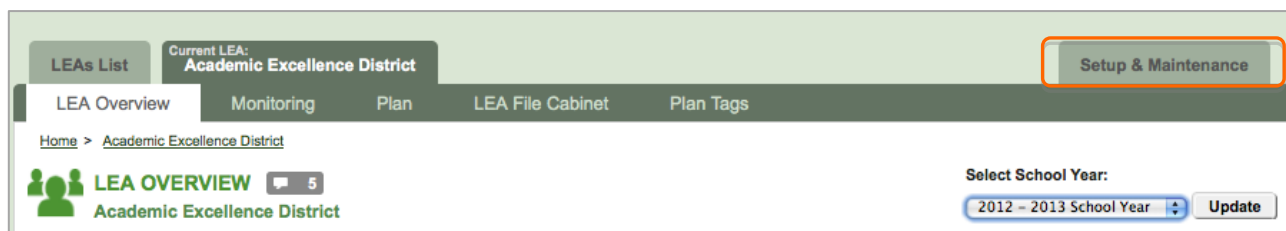
- Add or edit strategies, action steps, tasks, budget items and status updates
- View and upload documents
- View and add comments on plan elements

These users may also be assigned as a person responsible for an action step or task.

Note: In order to support users who provide services in multiple districts or schools, LEA or school level users in Tracker may be assigned to more than one organization. As a district or school administrator, you may only add or change user information specific to your organization; you may not modify information from other organizations, or retire a user who is actively assigned to other organizations.

Add Users

To add a new user, click the **Setup & Maintenance** link at the top of any page. Only LEA and School Administrators will see this link.



From the Setup & Maintenance menu, select **User Management**. You will see a list of all users currently assigned to your organization, and can search for users if needed.

Click **Add New User** to create and send an invitation to a new user.

Current LEA: Academic Excellence District Setup & Maintenance

User Management

[Home](#) > [Setup & Maintenance](#) > [User Management](#)

CONTACT ADMINISTRATION

Instructions/Description

FILTER

[Show Advanced Filters](#)

User Name

Assigned Users in Academic Excellence District

[+ Add New User](#)

Page size: 25 1 to 25 of 34 items

	Name	Organization	Email	Level	Role
Edit	Jane Austen	Academic Excellence District	ecarter+jane@wested.org	LEA	admin
Edit	Lilly Bart	Academic Excellence District	ecarter+lilly@wested.org	LEA	Read-Only
Edit	Ron Burgundy	Academic Excellence District	ecarter+ron@wested.org	LEA	

To add a user, complete the requested information. Select the **Level** (LEA or School) and the appropriate organization from the dropdown lists. The Level assigned to the user determines their access. Check the **Admin** box if the new user should have administrator privileges.

LEAs List Current LEA: Academic Excellence District Setup & Maintenance

User Management

[Home](#) > [Setup & Maintenance](#) > [User Management](#) > [Add User](#)

ADD NEW USER

Instructions/Description

Instructions/Description

First Name* 0/50

Last Name* 0/50

Email* 0/50

Phone:

Position: 0/100

Department: 0/100

Level *

☐ SEA

☐ LEA

☐ School

Role

☐ Admin

[Cancel](#)

When you click Create Account, an invitation with a link to the system will be sent to this user.

Click **Create Account** to send an email invitation, with a link to Tracker, to the new user.

User Access Levels

- **LEA User:** LEA Users can create plan strategies, action steps, and tasks, and upload documents to the File Cabinet. LEA Users can also see, comment on, and attach files to school plans in the LEA.
- **LEA Administrator** (Must be added by the SEA): In addition to performing all the functions of an LEA User, LEA Administrators have the ability to create new users in their district (LEA and school level), create LEA tags, manage goals and add or edit funding sources for the plan. They also have the ability to edit school plans in the LEA.
- **School User:** Where school plans are available, school users may perform all of the plan functions that LEA Users may perform. For LEA plans, school users may upload documents and post comments. They may see other schools' plans, but may not edit them.
- **School Administrator** (May be added by LEA Admin or SEA): In addition to performing all the functions of a School User, School Administrators have the ability to create new users for their school. They can manage goals and add or edit funding sources for their school plan.
- **Read-Only:** A user at any level may be designated as Read-Only. These users may view all information described here, but cannot modify any information within the system. Read-only users are not available for any plan assignments and may not receive posted comments. Please contact your State Administrator to request this option for a user.

User Management

User Management tools allow you to add or change user assignments or roles, and retire or disassociate users who no longer belong to your LEA or school. Click on the user name from the list of users to see details of their user account.

USER DETAILS
Description and Instructions for the contact view

Name Patricia Principal [Edit](#)

Email lrogner+pat@wested.org

Level School

Phone

Position

Department

Read-Only No

Invitation Number:
[CE7A358C56](#)
Sent 06/06/2012 by Libby Rognier. Accepted on 06/06/2012.
[Resend Invitation](#)

Organization Assignments

Monitoring Assignments

Plan Assignments

[Add Organization](#)

Edit All

Update All

Cancel Edit All

1

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1 to 2 of 2 items

Remove	Primary	Organization	LEA	County	Level	Role
Remove	<input checked="" type="checkbox"/>	Aloha Elementary - 19642126010862	ABC Unified - 19642120000000	Los Angeles - 19	School	admin
Remove		Carmenita Middle - 19642126066708	ABC Unified - 19642120000000	Los Angeles - 19	School	admin

1

Page size: 25

1 to 2 of 2 items

To assign the user to additional organizations, use the Organization Assignments tab and click **Add Organization**. Select the appropriate organizations for assignment and the user level for each, and click the **Associate Selected Organizations** button.

UNASSIGNED ORGANIZATIONS - 3 ORGANIZATIONS
Academic Excellence District

Select All Associate Selected Organizations

Page size: 25 1 to 4 of 4 items

Select	LEA ▲	Identifier	County	Select
<input type="checkbox"/>	aa California Test District	22222	Maricopa County - 344	<input type="radio"/> Admin <input type="radio"/> User
<input type="checkbox"/>	aa New Mexico Test District		Coconino County - 340	<input type="radio"/> Admin <input type="radio"/> User
<input checked="" type="checkbox"/>	Academic Excellence District		Pima County - 347	<input checked="" type="radio"/> Admin <input type="radio"/> User
<input type="checkbox"/>	Ace Test District	45454545	Apache County - 338	<input type="radio"/> Admin <input type="radio"/> User

If a person is associated with more than one organization, you may select a primary organization for the user, if you are an administrator for each of that user's assigned organizations. The primary organization name will appear with their user name in comments and user lists. Click the Edit link on the user's profile to select the primary organization. To remove access to organizations from a user, click the **Remove** link on their organization assignments list.

To change the user's role between User and Admin, click the **Edit All** button above the Organization Assignments list, then use the radio buttons to select the role. NOTE: you will only be able to change the role for those organizations to which you have administrative access.

Edit All Update All Cancel Edit All

Page size: 25 1 to 2 of 2 items

Remove	Primary	Organization ▲	County	Level	Role
		aa California Test District - 22222	Maricopa County - 344	LEA	<input checked="" type="radio"/> Admin <input type="radio"/> User
<input checked="" type="checkbox"/>		Academic Excellence District	Pima County - 347	LEA	<input type="radio"/> Admin <input checked="" type="radio"/> User

Retire a User

When a user has left your organization or changed roles, you may wish to retire them from active access to Tracker. Retiring a user removes all associated organizational assignments from the user account, including all monitoring and plan roles. Retired users cannot log into Tracker, will not receive e-mail communication, and cannot be assigned to any monitoring or plan role.

All activity tracked by the system will continue to be displayed for a retired user (such as recorded actions on an Action Step Status History or File Cabinet information about who uploaded a document) but the user's previous monitoring and plan roles will not be displayed anywhere in the system, including the user profile or the monitoring or plan assignment and display pages.

To retire a user, view the user's profile and click the **Edit** link next to their name. Click the **Retire** button on the Edit page. View the warning and confirm. Removing all organization assignments from a user will also mark them as retired.

User Management

[Home](#) > [Setup & Maintenance](#) > [User Management](#) > [Randy Writer](#)

EDIT USER

Description and Instructions for the contact edit

Instructions/Description

First Name* 5/50
Randy

Last Name* 6/50
Writer

Invitation Number:
[21A302CF77](#)
Sent 08/20/2012 by Don District.
[Resend Invitation](#)

Email* 18/50
rwriter@nomail.com

Phone:

Position: 5/100
Chair

Department: 21/100
English/Language Arts

Primary Organization:
Marvelous Middle School – S55555

[Save Changes](#) [Delete](#) **Retire** [Cancel](#)

Unable to delete this item because it is associated with other items in the system

View Retired Users

To view retired or unassigned users, use the **Show Retired** filter on the User Management list, in the Advanced Filters view.

[Home](#) > [Setup & Maintenance](#) > [User Management](#)

CONTACT ADMINISTRATION

Instructions/Description

FILTER
[Hide Advanced Filters](#)

User Name

Levels
All Levels

User Role
☒ Show Retired ☐ Admins Only

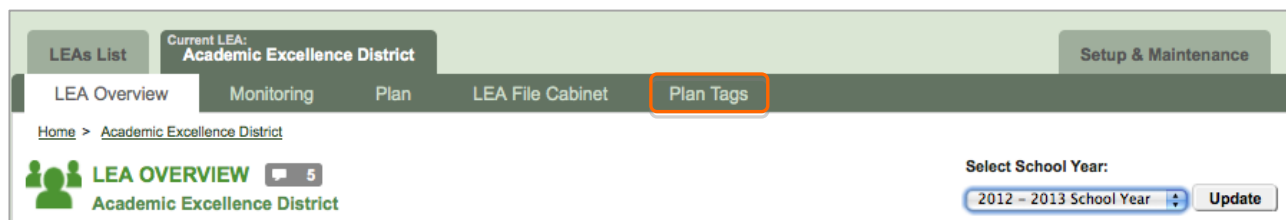
Reinstate a User

Adding an organization association to a retired user record will reactivate the user. This will not reinstate any previous monitoring or plan roles.

LEA Tags

In addition to the plan tags created by the SEA, the LEA administrator may create a local set of tags to support plan management and implementation needs. LEA Tags are available in the LEA and school plans.

To add LEA tags, click the **Plan Tags** link in the top navigation bar on the LEA Overview page:



You will see a list of LEA Tags already created, as well as a list of all SEA tags as reference. You may edit or delete existing LEA tags, or add a new tag. The Relationships column tells you how many action steps are marked with that tag.

LEA PLAN TAGS

This management page allows LEA Admins to create LEA Plan Tags to be used in addition to State-created Plan Tags.

[Add a New Tag](#)

Edit	Delete	Sort Order	Color	Short Name	Long Name	Description	Relationships
		1		2Priority	LEA 2nd Priority Action Step	2nd Priority Action Steps are also important for increasing student achievement and should be funded and implemented accordingly.	5
		1		School	School Specific Action	Designates a step that was added specifically for an individual school's needs, although it is also likely applicable to other schools in the district.	8
		2		1Priority	LEA 1st Priority Step	1st Priority Action Steps have the greatest likelihood of increasing Student Achievement, and should be given funding (and completion) priority.	19

STATE TAGS

These are existing State Plan Tags that are available. Do not duplicate these tags with new LEA Tags.

Click **Add a New Tag** to create additional LEA tags. The sort order is numeric, and values of 1-8 also determine the color of the tag. Tags with sort values 8 or higher appear grey in color. The short name field may be up to 10 characters, no spaces, and appears in the tag icon throughout the plan. The long name and description fields appear when hovering over the tag label anywhere in the plan.

LEA PLAN TAGS

This management page allows LEA Admins to create LEA Plan Tags to be used in addition to State-created Plan Tags.

[+ Add a New Tag](#)

1

Page size:

25

1 to 3 of 3 items

Edit	Delete	Sort Order	Color	Short Name	Long Name	Description	Relationships
<div> <div>Sort Order</div> <div></div> </div> <div> <div>Short Name: *</div> <div>0/10</div> <div></div> </div> <div> <div>Long Name: *</div> <div>0/30</div> <div></div> </div> <div> <div>Description:</div> <div>0/255</div> <div></div> </div> <div> <div>Insert</div> <div>Cancel</div> </div>							

Click **Insert** to save your tag and add it to the LEA tag list. You may also edit any existing LEA tags by clicking the pencil icon, or delete a tag by clicking the trash can icon. You can assign any or all SEA and LEA tags to any action step. However, only up to 8 of each type of tag will appear on the Plan Overview for an action step. Both sets of tags will show in the filters on the Plan Overview.

Tag Sort order colors:

1 = yellow	3 = light blue	5 = dark blue	7 = brown
2 = purple	4 = orange	6 = green	8+ = grey

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Goals

The state may pre-assign goals and strategies to your plan. You may add a local description to each to fit your needs. You may also create additional strategies under a state-assigned goal, but you cannot remove the assigned goals or strategies from the plan.

Plan Administrators may add new goals to the LEA or school plan. All users can add and edit strategies, action steps and tasks. To add a goal, click the **Manage Goals** tab on the Plan Overview. If you are not an Administrator, you will not see this tab.



The Manage Goals page shows the list of goals currently in your plan, and a list of state goal templates available for use in your plan. Goal templates are created by the SEA and may contain pre-defined resources, evidence and strategies. You may edit the current goals, add a state goal template, or add a new goal. You may also re-order goals to determine how they appear in your plan.

The Origin column indicates at what level the goal was first entered into Tracker. If the state created goals that are auto-assigned to your plan, the origin will be SEA. If you edit a state-created goal template, you will be able to customize the description, but may not change the title of the template. If you add a new goal, the origin will appear as LEA for LEA plans and School for school plans.

A screenshot of the 'Manage Goals' page. At the top, there are tabs: 'Plan', 'Timeline', 'Budget', 'Manage Goals' (selected), and 'Reports'. Below the tabs, the page is divided into two main sections: 'GOALS IN YOUR PLAN' and 'TEMPLATE GOALS'.

The 'GOALS IN YOUR PLAN' section has a sub-header and a description: 'This section displays goals that are currently part of your active plan. See below for available template goals to add to your plan or click the Add Goal link to add a custom goal.' Below this is an 'Add Goal' link with a plus icon. There are 'Reorder', 'Save', and 'Cancel' buttons. A table shows the current goals. The table has columns: 'Edit', 'Sort', 'Origin', 'Title', 'Description', '# of Strategies', '# of Action Steps', and '# of Tasks'. The first row shows a goal with origin 'SEA' and title 'Support to ELL Students'. Below the table is a pagination bar with 'Page size: 25' and '1 to 1 of 1 items'.

The 'TEMPLATE GOALS' section has a sub-header and a description: 'Click Add to Plan link next to the Template Goal you want to add to your plan.' Below this is a table showing available templates. The table has columns: 'Add', 'Origin', 'Title', 'Description', and '# of Strategies'. The first row shows a template with origin 'SEA' and title 'Goal 2A: AMAO 1 - Annual Progress'. Below the table is a pagination bar with 'Page size: 25' and '1 to 3 of 3 items'.

The state may retire goals that were assigned to LEAs or schools in previous years. If so, the retired goals, with their associated strategies, action steps and tasks may be viewed by selecting the **Retired** filter on the Plan Overview. You may reactivate retired plan elements from this view.

The screenshot shows the 'Plan Overview' interface with tabs for Plan, Timeline, Budget, Manage Goals, and Reports. The 'FILTERS' section includes dropdowns for Status (All Statuses), Funding Source (All Funding Sources), SEA Tag (All SEA Tags), LEA Tag (All LEA Tags), and Assignment (All Assignments). There are also dropdowns for Update (All Updates) and Goal (All Goals). The 'Type' section has radio buttons for 'Active' and 'Retired', with 'Retired' selected and highlighted by an orange box. Below the filters are 'Update' and 'Clear' buttons. The main content area displays two retired plan elements. The first is a goal named 'NCLB Reading Goal' with a status of 'In Progress' and a date of '05/24/2012'. It shows '0 of 2 Complete' for strategies, '0 of 1 Complete' for action steps, and '1 Overdue' for tasks. The second is a strategy named 'First reading strategy' showing '0 of 1 Complete' for action steps and '1 Overdue' for tasks. Both elements have budgeted and actual amounts of \$0.00. A 'Hide Detail' button is visible below each element.

Click the goal name, and then click the **Activate** button on the Edit Goal page to add the goal back to your active plan.

Budgets

Budgets allow users to associate specific plan activities with funding streams. The Plan Administrator must add funding sources and related allocations to the plan budget. These sources are then available for assignment to budget items throughout the LEA and school plans.

From any plan page, click the Budget tab at the top to see the overall plan budget. LEA or school Plan Administrators will see the **Add Funding Source** link.

The screenshot shows the 'Budget' interface with tabs for Plan, Timeline, Budget, Manage Goals, and Reports. The 'FILTER' section includes a 'School Year' dropdown set to '2011 - 2012 School Year' and radio buttons for 'Action Step Detail' (selected) and 'School Allocations'. There are 'Update' and 'Clear' buttons. At the bottom, a link labeled '+ Add Funding Source' is highlighted with an orange box.

Federal or State funding sources are created by the SEA, and may be selected for use in LEA and school plans. LEA Administrators may also create local funding sources. On the Add Funding Source screen, select SEA or LEA to add a new source. SEA funding sources will allow you to select from a dropdown list of all available Federal and State sources. (NOTE: If you have already added a source to your budget, you may edit it on the budget overview page. It will no longer appear in the drop-down list.) An LEA funding source requires a title and short title, as well as funding amounts.

School Plan Administrators will select from a single dropdown list of all funding sources added by the LEA. Funding sources must first be added to the LEA plan budget, and then may be added to the school plan budget.

Funding Sources include optional Carryover and Indirect amounts that may be used to help clarify total allocations. The Available Allocation is the sum of the Total Funding plus Carryover minus Indirect. This amount appears in the Total Allocation column in the plan budget. You may click **Calculate** to verify the amount before saving the record. These fields may be edited at any time.

ADD FUNDING SOURCE

Enter each funding source and amount of funding available to your district or school. This will help you build a budget for your specific actions.

Select School Year:
2012 - 2013 School Year

Source Type
☐ SEA ☒ LEA

Title 0/100

Short Title 0/20

Total Funding*

Carryover

Indirect

Available Allocation
0.00

Save Calculate Cancel

Funding sources are immediately available for assignment to budget items in both the LEA and School plans.